

VISION Account Codes for Marketing Expenditures

Guidance Document

Beginning on July 1, 2006, an expanded list of VISION account codes will be established to more accurately capture contracted marketing expenditures. This is part of a broader initiative to coordinate statewide marketing activity and is consistent with the legislative requirements of Act 71 Sec. 205a of the 2005 Session that call for consistency and efficiency in the use of state funds for marketing activity. Agencies and departments each currently use different definitions and methods for the categorizing and accounting of these types of expenses. As a result, the state does not have the ability to place a value on its purchasing power for these types of contracted services.

Reporting based on the expanded list of account codes will begin to offer information on the types and quantities of services utilized. Over time, this information will help with stronger negotiation of state contracts with media outlets and service vendors and provide guidance to the prioritization of support services needed by state agencies and departments.

I. Marketing Definition

Marketing products and services will be defined by the function they serve and not the by content or type of message they convey. In other words, awareness, educational, or outreach content and messages in any of the formats listed below are included in the definition and should be tracked using the newly defined account codes.

More specifically, for the purpose of implementing the new account codes, products and services purchased that result in any of the following items will be included as marketing:

- Advertising – TV, radio, print (newspaper or magazine), web/on-line, and sponsorships
- Print materials (collateral) - brochures, posters, rack cards, fact sheets, post cards/mailers, flyers, buck slips
- Trade shows and events
- Websites – the visual layout or graphic design components of the webpages
- Photography
- Giveaway or promotional items such as pens, magnets, luggage tags, logo'd hats or shirts

Conversely, the following expenses for products and services are NOT included in the definition of marketing nor shall they be assigned to the new account codes for marketing:

- Printing
- Postage and shipping
- Fulfillment and distribution
- Job vacancy advertising
- Research
- Website hosting and technical development or maintenance

II. Eligible Expenditures

The marketing account codes are being implemented to track contracted services only. Services performed by internal state employees or temporary staff should not be tracked using these codes.

III. Standardized Service Descriptions on Invoices

In support of these new marketing account codes, a standardized list of marketing services has been developed. The aim of this list is to make it easier to correctly assign account codes to the marketing expenditures. Each service directly maps to one of the marketing account codes. For example, *Writing*, *Copywriting*, and *Editing* will map to the **Creative/Development** account code.

The three state contracted marketing firms have agreed to use the standardized service descriptions on their invoices. Whenever possible and appropriate, marketing service and product vendors will be asked to use these service descriptions on their invoices. The standardized services are included next to the description for each new marketing account code.

A complete list of the standardized services and their definitions is included as an attachment to these guidelines.

IV. Terminated Account Codes

The following account codes will not be available for use starting on July 1, 2006.

516800	Advertising	Newspaper ads for legal notices, procurement bids, and publicity advertising to include pamphlets, road maps, bill boards, etc. Expenditure for food, non-alcoholic beverages and related expenses for the entertainment of guests and authorized employees in surroundings conducive to business discussions for the purpose of economic development. These expenses must not be incurred for personal or social purposes, or merely reciprocal in nature.
516810	Advertising – Media	Media costs
507000	Contr&3rd Party - Advertising	Compensation pursuant to the provisions of a contract for professional [advertising] services delivered directly to the state.
516805	Advertising – BGS	

V. Class, Program, and Project Codes

No changes will be made to the class, program, and project codes. These codes may still be used for departmental tracking and accounting of expenses.

Standardized Marketing Firm Service Names & Associated VISION Account Code

Service	VISION Account Code	Service Definition
<i>Creative Direction (may also be called Strategy/Concept Development)</i>	507561 Creative/Development	Develop the strategic platform for campaign concepts, including category, competitive and client research and analysis. Develop overall look/feel/tonality of overarching brand. Work usually performed by Creative Director and/or Associate Creative Director.
<i>Strategic Planning (may also be called Account Direction)</i>	507561 Creative/Development	Brand planning, strategic planning and analytical activity. Provide deeper insights into the dynamics of our clients' business through the development of disciplined and thorough sales, marketing, and consumer analyses. Work usually done by Director of Client Services, Director of Marketing and/or Account Supervisor.
<i>Graphic Design (may also be called Art Direction)</i>	507561 Creative/Development	Implementing the creative concept into all visual materials. May include supervising photo shoots, photo selection, layout and resize of various ad/collateral/visual materials. Usually done by Art Director (Junior or Senior) or Production Artist.
<i>Writing (may also be called Copywriting)</i>	507561 Creative/Development	Implementing the creative concept into headlines, scripts and body copy. Usually performed by Copywriter (Junior or Senior).
<i>Editing (may also be called proofing)</i>	507561 Creative/Development	Reviewing materials for accuracy (usually to a source document provided by client) and style (according to purpose and client industry norms, usually The Associated Press Stylebook, The Gregg Reference Manual, 9th edition, The Chicago Manual of Style, 14th Edition, Part 2, the Publication Manual of the American Psychological Association, 4th Edition, or Client Style Guide).
<i>Broadcast Development and Production</i>	507561 Creative/Development	Coordinating, overseeing and scheduling the production of broadcast materials based on creative platform. Who does this work is a function of the agency staffing but generally the concepting is part of Creative Direction and coordinating broadcast production would be done by a Production Assistant or an Account Executive.

Website/Multi-media Design & Development	507562 Creative/Development - Web	Create and implement design for website based on creative platform. May include programming and coding, system/software integration, transactional site development, content management. Design is most often performed by Art Director (Junior or Senior) and Development is most often done by a web specialist based on project – usually a coder or programmer (Junior or Senior).
Outreach / Public Relations	507563 Advertising/Marketing Other	Develop and write public relations plans and strategies. May include generating targeted publicity, writing press releases, coordinating special events, and conducting communication audits. Work usually performed by Public Relations department and may include other staff as needed.
Implementation Management	507563 Advertising/Marketing Other	see production
Project Management/ Account Coordination	507563 Advertising/Marketing Other	Direct and coordinate the day-to-day agency efforts on behalf of the client's product and/or service. May include tracking client budgets, moving projects through the agency from start to finish, coordinates scheduling and meeting client deadlines. Work usually done by Account Executive (Junior or Senior) or Account Supervisor.
Production (may also be called Traffic)	507563 Advertising/Marketing Other	Overseeing the process of creating and delivering an end product. May include estimating, negotiating, distributing, scheduling, purchasing and proofing for quality control. Usually performed by Production Manager or other production staff.
Advertising (may also be called Media Planning)	507564 Media-Planning/Buying	Develop strategic plan for media purchases. May include research, use of in- and out-of-house research tools, competitive analysis, media plan and post-buy analysis. Work usually performed by Media Director or Planner
Advertising (may also be called Media Buying)	507564 Media-Planning/Buying	Implement the strategic plan. May include negotiating, placing and sheparding the media buys. Work usually performed by Media Buyer.